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Abstract

The optimal way of implementing sustainable tourism is to identify that particular market segment that cares about environmental issues and does not perceive it as sacrifice to treat the destination's resources with care. This study aims at reviewing past endeavours in this direction and empirically illustrate the approach suggested by characterizing the group of sustainable summer vacationers in Austria. These tourists turn out to offer a strong basis for the creation of a sustainable niche segment for future marketing action.

Keywords

market segmentation, sustainable tourist

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PROFILING VACATION SEGMENTS WITH AN ENVIRONMENT PROTECTION ATTITUDE

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A STRATEGIC MARKETING APPROACH TOWARDS SUSTAINABILITY

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ABSTRACT

The optimal way of implementing sustainable tourism is to identify that particular market segment that cares about environmental issues and does not perceive it as sacrifice to treat the destination's resources with care. This study aims at reviewing past endeavours in this direction and empirically illustrate the approach suggested by characterizing the group of sustainable summer vacationers in Austria. These tourists turn out to offer a strong basis for the creation of a sustainable niche segment for future marketing action.

Key words: market segmentation, sustainable tourist

INTRODUCTION

Market segmentation is one of the key issues of strategic marketing. Numerous studies have been conducted since the emergence of this concept (Haley, 1968; Frank, Massy & Wind, 1972) both in industry as well as academia (Baumann, 2000). In the best case, segmentation helps to identify or construct one group of tourists or potential tourists that are homogeneous in as many characteristics as possible, be it demographic, socioeconomic or psychographic. Besides being homogeneous, the group of tourist chosen as target segment has to value a vacation that can be offered by the destination or company in search of the optimal consumer group to serve. This way, a perfect match between demand and supply can be achieved that represents a sound basis for consequent marketing strategy and action and thus long-term competitive advantage. When sustainability is in the centre of attention, that particular group of tourists should be targeted that not only seeks to experience natural beauty but also is willing to preserve it. Despite the simplicity of this concept, only few studies have so far investigated the characteristics of ecotourists or tourists that care about the natural resources in the country they visit. Palacio & McCool (1997) conducted both a literature review of segmentation studies within the field of sustainable tourism and a data driven segmentation study for Belize. The literature review illustrates that the segment descriptions or segmentation studies conducted almost never focused on sustainability (the only exception being provided by Eagles (1995) who conceptually differentiated between ecotourism, wilderness travel, adventure tourism and car camping); Pearce & Wilson (1995) as well as Bradford (1993, cited in Palacio & McCool (1997)) segmented wild-life viewing tourists by

activities and benefits, respectively and McCool & Reilly (1993) found four sub-groups of visitors of natural parks in Montana by means of benefit segmentation. The benefit segmentation study of Palacio & McCool (1997) in Belize resulted in four ecotourism segments: the natural escapist, the ecotourist, the comfortable naturalist and the passive players. Ryan and Huyton (2000) segment the tourists visiting the Northern Territory in Australia and (although the main emphasis of the paper was on aboriginal tourism) identify two segments that are highly nature-oriented in their interests. One group is strongly dominated by female travelers and almost half of this group is aged under 30 years. Visiting National Parks is a major interest of both these segments. Blamey & Braithwaite (1997) segmented 3500 Australian citizens according to their social values. As the focus is on the investigation of attitudes, little can be deducted for product development and marketing in tourism. But the authors clearly state that “little is known about the profile of individuals who are [...] driving this apparently lucrative market” and “Individual operators will clearly need to complement the results of broad-based segmentation studies [...] with studies that are more specific to the particular experiences they offer, “ thus pointing out the importance of understanding the market segment that cares about nature and sustaining the environment.

In this article, summer tourists in Austria are studied in order to reveal and best possibly understand the “sustainable market segment”. Information on the characteristics of this group can be used by marketing management to both attract this segment and provide the best suited service.

In general, a slight decrease in sustainability concern among summer tourists in Austria has taken place, as shown in Table 1 (comparable data from the summer Austrian National Guest Surveys of 1994 and 1997). The indicator used for the intensity of sustainability concern is the agreement of the respondents to the following statement: “On holiday the efforts to maintain unspoiled surroundings play a major role for me.” The respondents could answer the question by stating one of four answer categories: “applies to me (1) totally, (2) mostly, (3) a bit and (4) not at all”.

Table 1: Importance of efforts to maintain unspoiled nature

| | 1994 | 1997 |
|------------------|------|------|
| absolutely agree | 51% | 46% |
| agree strongly | 27% | 34% |
| agree | 17% | 15% |
| do not agree | 5% | 5% |

Unfortunately the question format changed in the summer 2000 survey, making the evaluation of a further trend impossible. 2000 45 percent stated to agree absolutely, 37 percent agreed, 13 percent slightly disagreed and 5 percent absolutely disagreed with the statement.

THE AUSTRIAN SUSTAINABLE GUEST SEGMENT

The data basis for the investigation is the Austrian National Guest Survey conducted in Austria during the summer season of 2000. 3575 respondents are included in the data set. These respondents have answered the question mentioned before by either strongly agreeing or disagreeing with the given statement implying sustainable tourist attitude. Among these 3575, 2524 strongly agree and are thus classified as “sustainable tourists”, the remaining 1051 are addressed as “non-sustainable tourists”.

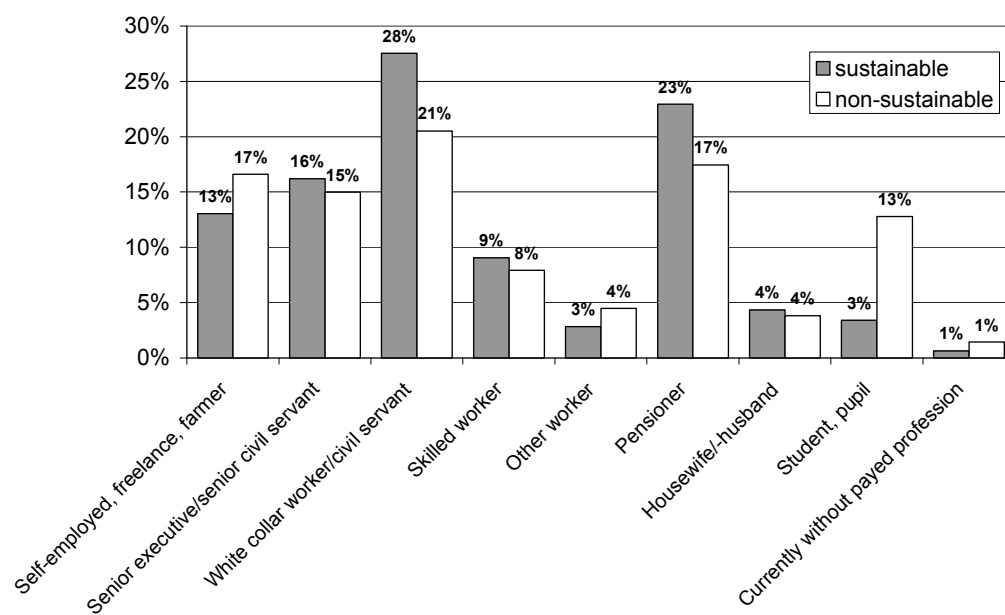
Comparison on the basis of sociodemographic characteristics

The two groups significantly differ in age (ANOVA p-value of 0.000): Within the sustainable segment the mean age is 48 years, the group less concerned about sustainability of tourism is 5 years younger. This difference is reflected by the significant difference in average net income (ANOVA p-value 0.005) with the older groups earning 15 percent more in average.

Another significant difference is the country of origin of the two segments under study (Chi-square p-value = 0.012). The most interesting insight being the fact that German visitors are more strongly represented in the sustainable group than in the non-sustainable segment whereas the opposite is true for Austrian citizens spending their vacation in their own country.

Highly significant differences (Chi-square p-value = 0.000) are observed when comparing the professions of the two segments under consideration, as illustrated in Figure 1. The proportion of tourists that care about maintaining and protecting the natural environment at the travel destination in general reaches its highest values among white-collar workers and pensioners. At the same time the sustainable attitude dominates in these occupational categories, as compared to the group of students and pupils, who have a far higher proportion of members in the non-sustainable group than in the sustainable one.

Figure 1: Occupational categories (in percent of the respective segments)



Comparison on the basis of travel behaviour

The sustainable tourists are not found to use more environmentally friendly means of transportation. Significant differences concerning the means of transportation do exist (Chi-square p-value = 0.000) but in the counter-intuitive direction: six percent more members of the sustainable group (68 percent of the segment) use their private car than the non-sustainable tourists. The latter use the train and airplanes significantly more often (11 percent as compared to 7 and 6 as compared to 3). The private camping van is used as means of transportation more often by the sustainable group (10 percent as compared to 6).

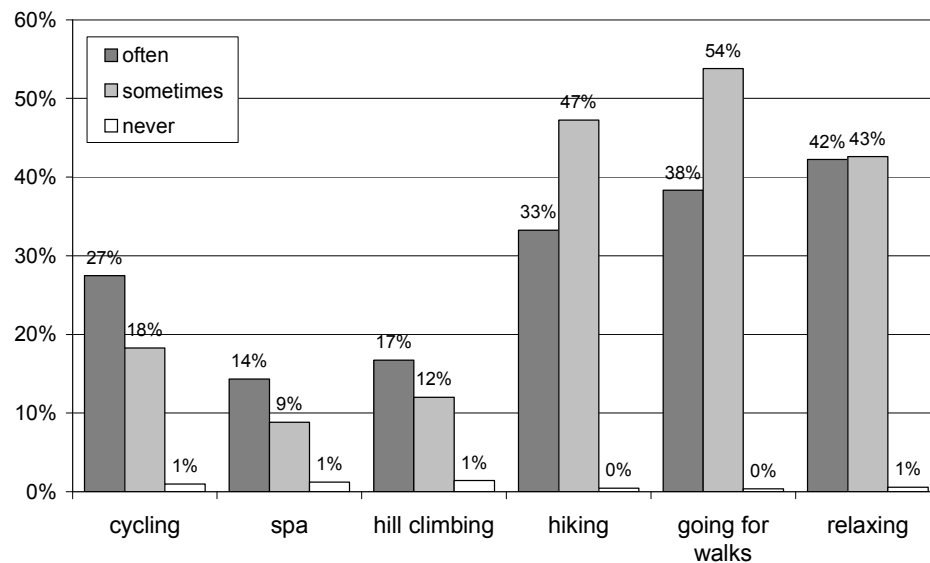
No significant differences in the average daily expenditures per person could be detected between the sustainable and the non-sustainable group of travelers by means of analysis of variance, a very important finding, as this fact clearly makes the sustainable segment a more attractive one for targeting. The same turns out to be true in terms of the duration of stay: no matter, at which level the overnight stays are evaluated (country region or destination), the environment-conscious tourists stay significantly longer, which means two days in average. Again, a very attractive feature of the segment.

Detailed information is available from the Austrian National Guest Survey about the vacation activities of the respondents: a number of leisure activities very well differentiates between the segments under consideration, others do not at all. Insignificant results are obtained for the following activities: playing tennis, horse-riding, playing golf, swimming, boating and organized excursions.

One general tendency is revealed by the group comparison as far as the vacation activities are concerned: The sustainable segment does not engage in single activities strongly whereas the members of this group seem to undertake activities from time to time more often than the group that does not feel strongly about the need to protect environment at the destination. This systematic difference applies to the following vacation activities:

Riding the bicycle: The difference between the two segments constructed for comparative purposes is highly significant (Chi-square p-value=0.001). As the proportion of tourists riding a bicycle often and never is over-proportionate among the non-sustainable group, it seems that the sustainable group engages in biking from time to time, without biking being the central focus of the vacation.

Figure 2: Activity profile of the sustainable summer tourist in Austria



Visiting a spa (Chi-square p-value = 0.023): Among the non-sustainable tourists, 16 percent go to spas often, while only 14 percent of the sustainable segment do so. On the other hand, 9 percent of the latter go to spas from time to time, as compared to only 6 percent among the tourists that

Hill climbing (Chi-square p-value = 0.042): Although the difference is not strong for hill climbing in the category “often” (17 percent among the sustainable group and 18 among the others), it is remarkable in the “sometimes” answer category with 12 percent versus 9 percent.

Hiking (Chi-square p-value = 0.000): The reason for the highly significant difference in this vacation activity can be found exclusively in the dramatic deviation of the agreement to the question, whether the respondent hikes sometimes during the vacation. In this middle answer category 47 percent of the members of the sustainable group answer with “yes”, as compared to no more than 28 percent among the non-sustainable group.

Going for walks, strolling around (Chi-square p-value = 0.000): 38 percent of the sustainable group state to go for walks often, 54 percent from time to time as compared to 45 and 40 percent in the other group of tourists.

Relaxing, doing nothing (Chi-square p-value = 0.001): Even “doing nothing” is something 43 percent of the sustainable group of tourists states to enjoy sometimes. And this category is the one most strongly influencing the high significance of the result. Only 37 percent of the non-sustainable tourists “do nothing” sometimes. In both groups slightly more than 40 percent state to relax very often during the vacation

Highly significant differences in the choice of the region in Austria can be revealed by a simple cross-tabulation (Chi-square p-value = 0.000). That way a strong interrelation between sustainable tourist frequency and spending a vacation in either Kärnten or Salzburg, both regions known and valued for its lakes and hills. Another surprise is the small amount of environmentally conscious tourists in Niederösterreich, the north-eastern part of Austria, a region that has been advertising cycling vacations in a pleasant environment around the Danube. This latter finding will certainly require further investigation.

Guest satisfaction and recommendation rate

The sustainable tourist segment in Austria is found to feel significantly more often that the vacation so far has been better than expected.

The questionnaire of the Austrian Guest Survey also investigates the visitors' satisfaction with single factors of their vacation. Most of the factors are evaluated in a significantly different manner by the two segments under consideration, with the pattern always mirroring the feelings about the entire vacation. This means that the sustainable segment is positively surprised more often, whereas the non-sustainable group feels that the expectations have been met more often. This kind of difference in evaluation has been found to be significant for the following vacation components: landscape / scenery, beauty of town / village, peacefulness / quietness in town, furnishing and pleasantness of accommodation, service in the accommodation, cuisine / catering, friendliness of the local people, friendliness of locals, walking and hiking paths, cleanliness of the village / town, public transportation, shopping facilities and alternative programs in case of bad weather. The assumption, that the sustainable groups might be more familiar with the destination than the non-sustainable group proves right (Chi-square p-value = 0.002) to a small extent: 76 percent of the sustainable tourists have been in Austria twice or even more often, as compared to 71 percent in the non-sustainable group. The proportions of first-time visitors are 12 to 16 percent.

Another pattern of significantly differing evaluation of the two segments occurs when the offers of art and culture are evaluated. Here, the sustainable group is more realistic in the expectations whereas the non-sustainable group feels positively surprised more often.

No differences in the guest satisfaction of the two segments can be identified for the judgements of sports facilities as well as opening hours of shops.

To sum the survey results on guest satisfaction up, it shows that the sustainable group is in general surprised in a positive way more often than the non-sustainable tourists are. This obviously is a very pleasant characteristic that is expected to positively influence the intention to recommend Austria as tourist destination. An assumption that turns out to be mirrored in the respective test results: the sustainable segment has a significantly higher intention to recommend Austria as tourist destination (Chi-square p-value = 0.000). 80 percent of the sustainable segment indicate that they will most certainly recommend Austria. Among the non-sustainable guest, the proportion amounts to 56 percent only.

Sub-segmenting potential

The fact that 36 percent of the summer tourists in Austria are classified as sustainable raises the question whether it is worthwhile to further subdivide this group in order to identify niches with e.g. homogeneous interests in terms of leisure activities. This idea is illustrated by a simple cluster analysis (using the k-means algorithm implemented in the SPSS software package with Euclidean distance used as measure of association) to group all summer tourists according to their preferred leisure activities. The sub-segmentation is based on all 7055 respondents included in the summer survey data set, the activities are in binary format indicating that an activity was either undertaken or not. A comparison of the frequency distributions of all summer tourists and the sustainable segment is provided in Table 3.

Table 2: Sustainable sub-segments based on leisure activities

| | sub-segment 1 | sub-segment 2 | sub-segment 3 | sub-segment 4 | sub-segment 5 |
|----------------------------|------------------|------------------|------------------|------------------|------------------|
| tennis | 46% | 28% | 1% | 8% | 8% |
| biking | 85% | 59% | 3% | 38% | 23% |
| horseback riding | 17% | 19% | 1% | 3% | 3% |
| golf | 17% | 23% | 2% | 5% | 6% |
| swimming | 91% | 85% | 7% | 80% | 58% |
| Spa | 14% | 50% | 2% | 22% | 18% |
| boating | 38% | 55% | 4% | 29% | 13% |
| hillclimbing | 43% | 56% | 1% | 20% | 15% |
| hiking | 84% | 88% | 6% | 88% | 56% |
| going for walks | 91% | 95% | 93% | 97% | 78% |
| organized excursions | 21% | 59% | 38% | 24% | 13% |
| individual excursions | 84% | 84% | 66% | 86% | 41% |
| relaxing | 87% | 82% | 78% | 89% | 75% |
| going out for dinner | 90% | 89% | 89% | 78% | 63% |
| shopping | 85% | 90% | 82% | 78% | 40% |
| festivals & concerts | 20% | 79% | 37% | 8% | 7% |
| sightseeing | 73% | 97% | 96% | 97% | 14% |
| tyrolean evenings | 16% | 61% | 5% | 21% | 8% |
| local / regional events | 56% | 75% | 38% | 36% | 18% |
| discotheques | 72% | 41% | 47% | 8% | 17% |
| health facilities | 17% | 56% | 4% | 25% | 20% |
| trend sports | 17% | 13% | 1% | 1% | 4% |
| sailing | 19% | 17% | 1% | 4% | 2% |
| museums | 33% | 91% | 75% | 60% | 5% |
| theatre, musicals | 8% | 75% | 10% | 9% | 5% |
| rollerblading | 37% | 16% | 1% | 2% | 4% |
| mountainbiking | 48% | 20% | 1% | 4% | 6% |

Table 2 illustrates the sub-segmentation profiles of the five groups based on their leisure activities. Sub-segment 1 has a broad range of different activities including sports as well as culture, the second group focuses on culture more strongly, the third segment (which is particularly interesting because of the extreme deviation of segment size between the total number of respondents and those classified as sustainable tourists) is best characterized by avoiding any kind of sports except for walks. Sub-segment 4 does get involved in some “soft” sports activities and is also selectively interested in cultural offers. Finally, the last sub-segment is very well profiled as well: relaxation is the most important mission when on vacation.

Table 3: Sub-segment sizes

| | all summer tourists | percent of summer tourists | sustainable segment | percent of sustainable segment |
|---------------|---------------------|----------------------------|---------------------|--------------------------------|
| sub-segment 1 | 1035 | 15% | 395 | 16% |
| sub-segment 2 | 1058 | 15% | 441 | 17% |
| sub-segment 3 | 1627 | 23% | 167 | 7% |
| sub-segment 4 | 1903 | 27% | 956 | 38% |
| sub-segment 5 | 1432 | 20% | 565 | 22% |

The conclusion from this illustrative segmentation analysis is that, if the segment of sustainable tourists is large enough, it might not only be interesting to profile it in general, but it might be worthwhile to further investigate interesting subgroups that might be homogeneous with respect to some characteristics that are relevant for destination management.

CONCLUSIONS

In the case of Austria, the tourists caring about environmental protection turn out to be a highly attractive target segment as they do not require any sacrifices from industry. Instead, this group of tourists turns out to spend just as much money per person per day as the remaining tourists. In addition, the sustainable tourists stay in Austria two days longer in average and the touristic product does not have to be highly specialized and is therefore less endangered by short-term trends. Pensioners are over-proportionately represented in this group, a fact that can aid in stimulating vacation activities outside of the main season and simultaneously reduces risk.

The insight that a large proportion of the Austrian summer tourists feels very strongly about the importance of maintaining the natural environment, the size of the sustainable segment would even make it possible to further sub-segment the market, if real niche markets are searched for.

All in all it seems more than worthwhile to investigate the characteristics of tourists with a nature-preserving attitude for single destinations. Instead of motivating tourists to preserve the natural environment those individuals can be attracted that by themselves feel that this is important to them. This self-selection process that takes place by consequent marketing action might turn out to be more effective than the “convincing approach”. Of course, different sustainable segments will most probably be identified in different regions of

the world, but some of them might prove equally or even more attractive as target segment as it is the case for Austria. And there is certainly no better motivator for sustainable tourism than economic success. Investigating differences in sustainable tourist groups at different destinations worldwide would be a highly interesting project for future work in this field of research.

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